

THE MINERAL MATERIALS MEETING THE NEEDS FOR

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European Commission
Enterprise and Industry



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Introduction

- The EU is highly dependent on imports of strategically important raw materials which are increasingly affected by **market distortions**.
- Exploration and extraction are facing **increased competition** for different land uses and a highly regulated environment.
- Need for an **integrated response**, as suggested by Council in May 2007.
- Analysis & proposed measures apply in a high degree to other non-energy raw materials.

Analysis of supply and demand

- From self-sufficiency to **high import dependence**
- Need for primary and secondary raw materials
- Certain materials particularly **critical**

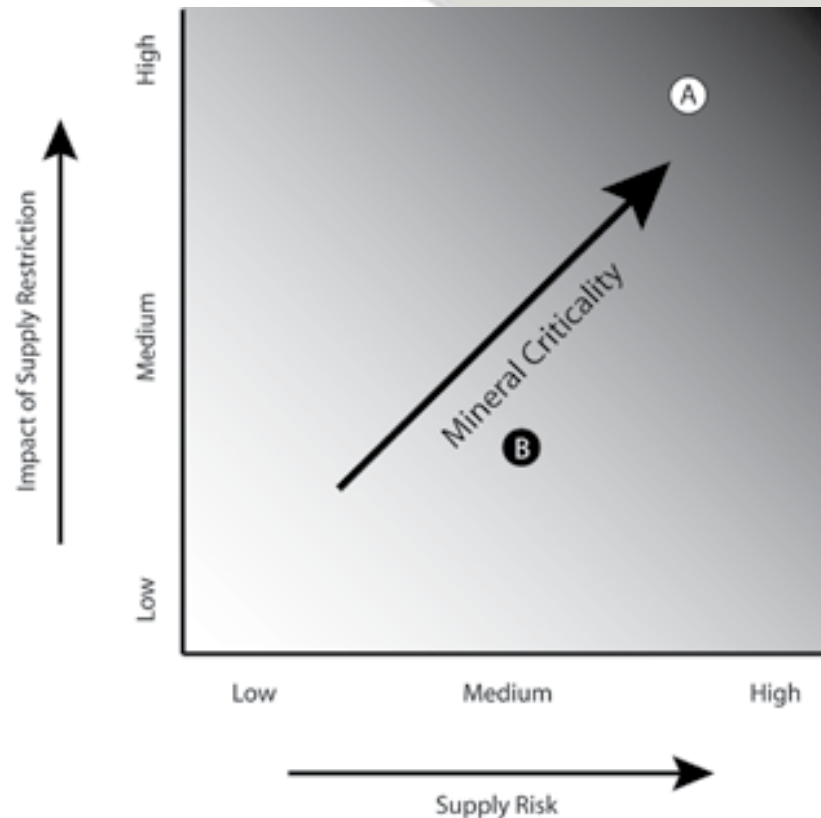
- **Fundamental changes** on global markets
 - 450 export restrictions on more than 400 different raw materials
 - Strategies to secure privileged access to raw materials
- 50% of major mineral reserves located in **low income countries**

An integrated strategy based on 3 Pillars

1. Ensure **access to raw materials** from **international markets** under the same conditions as other industrial competitors;
2. set the right **framework conditions** within the EU in order to foster sustainable supply of raw materials from **European sources**;
3. boost overall **resource efficiency and promote recycling** to **reduce the EU's consumption of primary raw materials** and decrease the relative import dependence.

Define critical raw materials

- identify - in close cooperation with Member States and stakeholders - a methodology and list of critical raw materials.



Access to raw materials on world markets at undistorted conditions

- Launch of EU strategic raw materials diplomacy
- Include provisions on raw materials in bilateral and multilateral trade agreements and regulatory dialogues
- Challenge trade distortion measures
- Promote sustainable access to raw materials in development policy

Fostering sustainable supply of raw materials from European sources

- Improve the regulatory framework related to access to land (*e.g. exchange of best practices, guidelines Natura 2000*).
- Encourage better networking between national geological surveys to increase EU's knowledge base
- Promote skills and research

Increase resource efficiency and foster substitution of raw materials

- Give impetus to **resource efficiency** and eco-innovative production processes:
 - **EU Action Plan on Sustainable Consumption and production and Sustainable Industrial Policy**
 - **EU Thematic Strategy Sustainable use of natural resources**
- **Promote research** projects on resource-efficient products and production; development of substitutes.



Exchange of best practices

- Minerals policy
- Land use planning
- Authorisation of minerals exploration and extraction (incl. permitting)
- Codes of practice to achieve technical and environmental excellence

Promote recycling and facilitate the use of secondary raw materials

- Commission & Member States should:
 - Ensure sound and harmonised enforcement of the **Waste Shipment Regulation**;
 - Release information on illegal shipment flows.
- **Encourage recycling markets** through the following measures:
 - Legislation, standards and labelling;
 - Public procurement; Financing;
 - Knowledge sharing and international action (2008-2011 Action Plan for the **Lead Market Initiative on Recycling**).



Way forward

- The Communication was sent to the **Council of Ministers** and to the **European Parliament**.
- Competitiveness Council Conclusions of 28-29 May 2009 **endorsed overall thrust and objectives** of the Communication.
- **Implementation work with Member States and stakeholders.**
- Report to EP and to Council by end of 2010.